

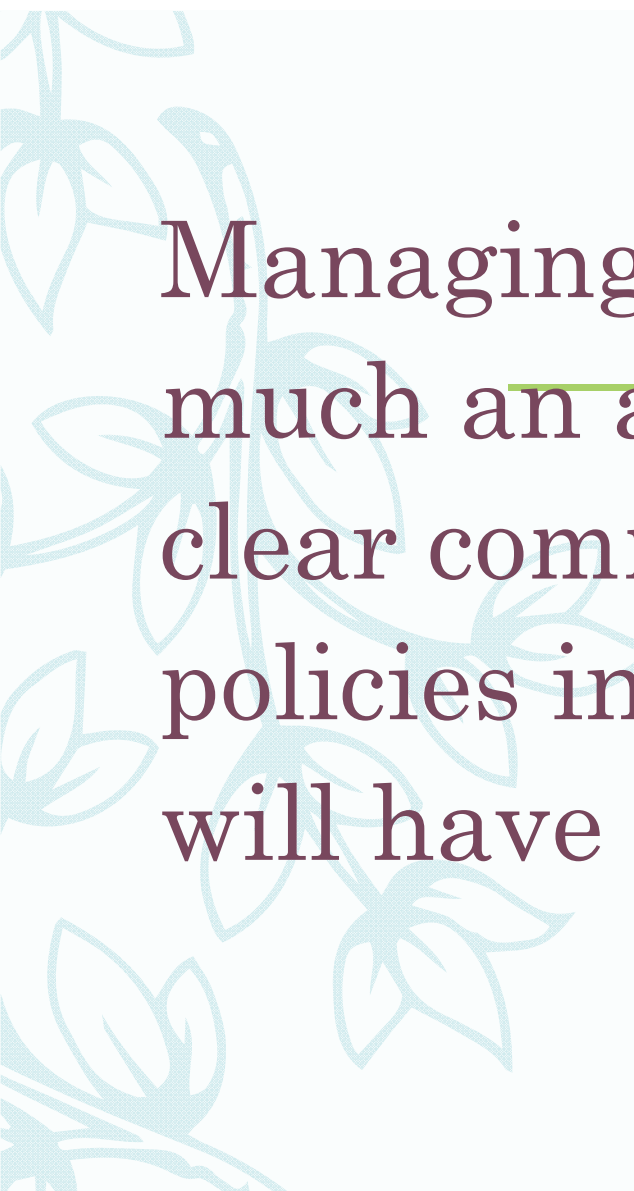


President I The Basics

Presented by:

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Missouri PTA President



Managing a nonprofit group is as much an art as it is a science. With clear communication, structure and policies in place, your organization will have a truly successful year.

Getting off to a Great Start Preparing to Lead

- Review bylaws.
- Review PTA records from the past year.
- Review resources from National PTA and Missouri PTA.
- Take an inventory of PTA property and familiarize yourself with storage locations.
- Clarify job descriptions for board members. To maximize your time and effort as a volunteer – ensure that you understand the responsibilities you have committed to. Clarify what needs to be done and when – and schedule the time for it



★
EVERY
ACCOMPLISHMENT
STARTS WITH
THE DECISION
TO TRY.
★

Read, Read, Read



- Bylaws
- Standing Rules if your unit has them, if not make this a goal
- National PTA Resources www.pta.org
- Missouri PTA website www.mopta.org
- Past President's Procedure Books, Minutes and financial reports from previous years
- Our Children & Contact

AIM High, React Quick

- Set goals with your board based on the needs of the children, the parents, the school and the community
- Make a calendar and schedule programs or events for the year
- Make a budget
- Set rules and boundaries for your board

The sky is the limit!
Aim high...

Review Unit in Good Standing

- Membership Dues (State & National) turned in regularly to state by dates required;
- Unit Annual Financial Review (formerly known as “Audit”) to State Office by December 1st;
- Fiscal Year-End Report to State Office by December 1st
- Submits a copy of the required IRS tax form to the state PTA by December 1st;
- Has bylaws approved every three years according to the procedures of the state PTA;
- Officer’s list to State Office by March 31st.
- Adherence to the Purposes & basic policies of PTA



What happens if Unit is not in Good Standing?



- If a PTA is not in good standing, neither the unit nor the students attending the PTA's school are eligible to receive awards and recognition, e.g., membership awards, Reflections, etc.
- If our PTA is "not in good standing" how do we fix it? If a unit has become "not in good standing", as soon as it has fulfilled the necessary requirements, it is again considered "in good standing".
- How often do our bylaws have to be reviewed? Bylaws are required to be reviewed/updated and sent to the state office every three years.
- What if we don't have all the positions filled requested on the Officer's Form? Fill in the information known on the officer's form by March 31st, and then send the other information as positions are filled.
- What is the "Fiscal Year-end Report"? This is compiled by the treasurer at the close of the PTA's fiscal year showing all actual receipts and expenditures.

Clarify the Goal

For each Project, make sure the person in charge knows the destination and the mile markers that will characterize success.

PLAN OF WORK/ PROGRESS REPORT

Your PTA/PTSA Name: _____

School Year: _____

PTA Position / Chairman: _____

Your Name _____

Phone Number _____

Email Address _____

Please provide a brief description of your plans for your committee or department. A Plan of Work is presented at the August Board Meeting for approval. An update or progress report is due from all committee chairs at the December Board Meeting. A final recap of the year is due at the April Executive Board meeting for inclusion in the Historian's report as part of the May Council Newsletter. 4 copies are needed (president, secretary, your procedure book and your VP's procedure book).

Thank You!



Teach Them to Fish



Teach committee chair-people how to manage their project and stay in touch to provide support as needed. As long as they reach the mile markers, it may not matter if they do it exactly as you would. Make sure they have the tools and information to do the job and then encourage an atmosphere of asking for help when needed.

"Encourage, lift and strengthen one another. For the positive energy spread to one will be felt by us all."

- Deborah Day

Trust the journey

Each person is involved because they want to make a significant contribution. Rely on them in real ways, including delegating even when it's not easy. Better to share the load and discover each person's talents than become resentful trying to do it all yourself. You'll both learn something.



Keep Your Eye on the Prize

Remember to manage for end results, regardless of methods. While it's true there may be a few wrong ways, there may also be a hundred ways to get things right! And, perhaps, some of them you would never have thought of on your own.

“Success doesn't
happen overnight.
Keep your eye on
the prize and don't
look back.”

Erin Andrews



*At all times, keep your eyes on
the prize!*

Structure the Work



Use clear timelines to promote a project's success. Timelines give everyone a neutral way to check on progress. Meet or touch base monthly as needed, then weekly as the event approaches. Allow the chairperson to be project leader, by being the compass instead of the taskmaster.



Celebrate Success

Teams come together when there is honest recognition of each person's skills and talents. Don't wait until the end of the project to appreciate their efforts. And don't take it personally if your efforts seem invisible. That's often the mark of a true leader, to make it seem effortless. Celebrate with success of becoming a team.



yes
you can!



Leading Effective Meetings

Do you ever get frustrated by board meetings that go on and on and on? Are just plain disorganized? Or don't seem to have a purpose?

Effective board meetings don't just happen. They are the result of planning and careful management. To hold concise, fruitful meetings, consider the following tips from nonprofit leaders from across the country.



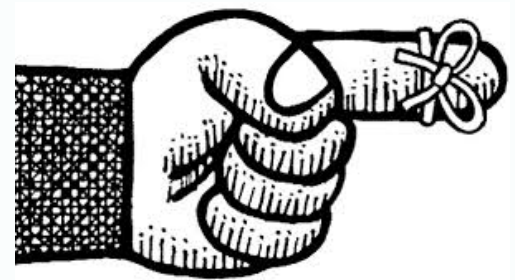
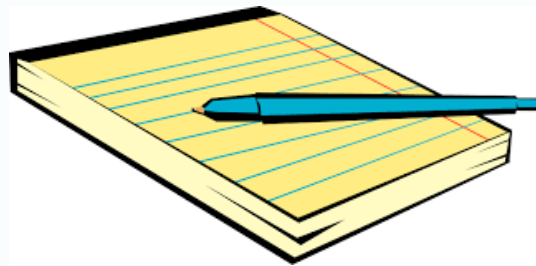


Suggested Guidelines

1. Choose a standing date / time and agree to stick to it. No matter who can't come, keep to the scheduled meeting time to avoid endless loops of schedule conflicts.
2. Agree to start on time. Don't wait for people to trickle in!
3. Prepare and send out the agenda a week before the next meeting (or at least 48 hours before the meeting). Most often it is the president who is responsible for this task.
4. Create an attendance list to expedite determining whether you have a quorum. Each member initials by their name.
5. Make your agenda a working document. Try including start times for each item. For example: 6:30 Welcome 6:35 Minutes of Previous Meeting 6:40 Treasurer's Report etc. Use the scheduled times to keep things moving along. Or set time limits for each speaker.
6. If you are leading the meeting, ensure that you follow protocol. Consult your bylaws and Robert's Rules of Order (www.robertsrules.org).
7. Don't allow Board Members to take over the meeting. This is the time to report Committee business, not to do Committee work.
8. Ensure that minutes are taken at every meeting by the secretary and sent out no later than a week after the meeting, preferably sooner. Meeting minutes need to include each agenda item, a summary of the discussion, and a conclusion.
9. Try attaching a list of action items to the minutes with expected dates for completion and person responsible. This will help keep up momentum.

Note to Self

- Don't surprise your board
 - Pay attention to comfort
 - Set rules
 - Keep it short
 - Share the spot light
 - Plan ahead
 - Ask for feedback
-



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Eliminating Opportunity

While the decisions that you make for your unit are not likely to hit the billion dollar mark, it is still important that you conduct your financial affairs prudently.

It's not just the treasurer who is on the line here - financial responsibility rests with you as well. Make sure that your board has procedures in place to adequately record and monitor the financial activities of your organization.

Procedures to Consider

- Prepare an annual budget (income and expense) that reflects the values and mission of your organization.
- Review your budget regularly and change course if necessary.
- Ensure that no single individual is responsible for: 1) receiving, recording and depositing funds or 2) approving expenditures and writing and signing checks. (These checks and balances eliminate opportunity for embezzlement.)
- Require two signers on checks.
- Have bank statements sent to school and another board member opens (other than the treasurer) and reviews on a monthly basis. Required by insurance.
- Make sure that contributions and donations are received and properly recorded. Separate deposits by events.
- Thank your donors.
- Ensure that timely and useful financial reports are available to all board members.
- Establish an emergency fund to cover unexpected expenses or fundraising shortfalls.

Developing a Successful Budget

What you'll need:

- Actual income and expenses for the last 2 or 3 years (if available)
- A list of standing obligations: what has already been committed to for the next financial year
- A list of services you have provided in the past and intend to provide in the upcoming year
- A “wish list” of services that could be provided if funds are available
- A list of the various ways that the organization can raise money



Start with Outgoing Money

Divide expenditures into 4 key areas:

- Core Purpose Activities (i.e. after school music program or monthly membership breakfast)
- Supportive Services. These benefit your membership or community, but are not part of your core purpose (i.e. school carnival, summer picnic, social events)
- Overhead Expenses to keep your organization running (e.g. leadership training, office supplies, postage)
- Wish List (things you will do only if extra money is available.)

Examine what your group has actually spent in each of these areas over the last year or two, and come up with an estimate of how much you need for the upcoming year. Totaling each area (core purpose / support / overhead) can be very informative – it's surprising how many groups just budget the same as last year for many activities, without looking at how much was actually spent.

Measure the In-Coming Money

What are the ways your organization has raised money in the past? Go through the same exercise: look at your income over the last year or two. What activities will you repeat? What was successful? What was a bust? What needs a year off? What's realistic? Get a total for what you hope to raise and how you plan to do it.



The Balancing Act

Look at the two lists: income and expenses. If your expenses outweigh your income, you probably know the two alternatives: cut back on your expenses or increase your fundraising. Which will better serve your membership? Can you raise membership fees? Add another fundraiser? Apply for a grant? Request more volunteer time or effort?

If your income outweighs your expenses, you also have decisions to make. Do you cut back on fundraising and give your volunteers a break? Do you raise the bar for the services you provide and do more this year?

Set Money Aside

The final budget topic is “carry-over.” Every organization needs some money in the kitty at the beginning of the year. How much is right for your group? If you plan your major fundraising activities early in your financial year, you can get by with less carry over. But if you have major financial commitments each year, you will want to ensure that you have a reserve sufficient to meet these, even if your fundraisers don’t do as well as planned.

A budget is a plan - a working document. Responsible boards re-visit it regularly during the year to adjust expectations and help keep things on track.

Why Insurance?

Isn't insurance for larger agencies or organizations? What's the benefit to us?

If these questions go through your head, then take a moment to imagine this:

- Someone accuses you of mismanaging your group
- Someone accuses you of distributing false or misleading information
- Money is somehow missing
- A child is hurt at one of your events
- Property is damaged at one of your events
- Your fundraising product is damaged or stolen

You may believe that your PTA can't afford insurance, but if one of the above scenarios happens to you, and you are not adequately insured — your board members could be held personally and financially responsible.

We don't want to have to imagine these things, just as we may not want to admit that we live in a society where this could happen. It may not be the reality we would choose, but it's the one your PTA finds itself in today.

Manage risk responsibly. Avoid lawsuits. Insure to be sure.

If your PTA has no insurance, whether you are staff or a volunteer, please consider running out the door immediately until it does.

It pays to shop around. It can be very helpful to have the assistance of a knowledgeable insurance professional. Ask your regional or council leader for advice. The price of insurance is part of the cost of doing business in the nonprofit world.

IT ALWAYS
SEEMS
IMPOSSIBLE
UNTIL
IT'S DONE.
-NELSON MANDELA

GREAT LEADERS DON'T
SET OUT TO BE A
LEADER...THEY SET OUT
TO MAKE A DIFFERENCE.
ITS NEVER ABOUT THE
ROLE-ALWAYS ABOUT
THE GOAL.

"A dream is just a dream.
A goal is a dream with
a plan and a deadline."
- Harvey Mackay -

YOU HAVE TO
DO EVERYTHING YOU CAN
YOU HAVE TO WORK YOUR HARDEST
AND IF YOU STAY POSITIVE
YOU HAVE A SHOT AT A SILVER LINING

Silver Linings Playbook (2012)



The way to get started is to
quit talking and begin doing.

Walt Disney

GIVING UP
ON YOUR GOAL
BECAUSE OF ONE SETBACK
IS LIKE SLASHING YOUR
OTHER THREE TIRES
BECAUSE YOU GOT
ONE FLAT.

“Yes, well I really hope
I can make a difference,
even in the smallest way.
I am looking forward to
helping as much as I can.”

KATE MIDDLETON
Wife of Prince William



wake
up with
determination.
go to
bed with
satisfaction.

Media
vancouver.org

SUCCESS

SUCCESS

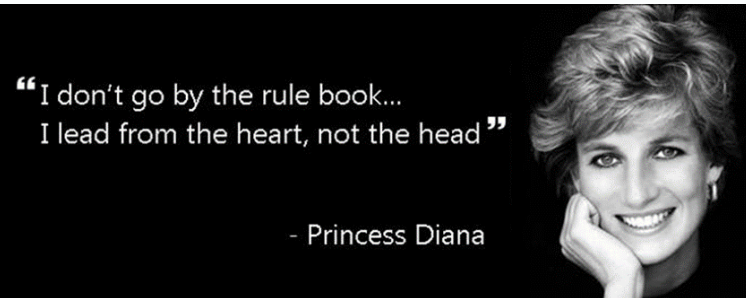


WHAT PEOPLE THINK
IT LOOKS LIKE

WHAT IT REALLY
LOOKS LIKE

Final Thoughts

Know that you are not alone. Missouri PTA is here to support you on your journey this next year.



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Missouri
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everychild. onevoice.